Kiteworks

Kiteworks Getting Started Guide

July 2022

Version 7.9.0-01

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Corporate Headquarters

Accellion USA, LLC
1804 Embarcadero Road, Suite 200
Palo Alto, CA 94303, USA

Contact Us

p. 1.650.485.4300 | f. 1.650.485.4308
www.kiteworks.com

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Create or activate your user account

As a new user, you may receive an email request to activate your user account or to collaborate on files in a shared folder. In other circumstances, you may receive a link to download files from Kiteworks, or you may just want to create an account on your own. Depending on your situation, you create an account in one of the following ways.

You received an email stating your account was created.

To activate your account:

1   In the email, click "Activate account".

2   Create a password for your account, and then sign in with your email address and password.

3   If required, enter a mobile number to receive a one-time passcode for verifying your identity. Once you receive the code, use it to finish signing in.

   Tip: To select a country code, start typing your country name in the Country field.

You received an email containing a link to a shared folder.

To create your account and access the folder:

1   In the email, click "Access folder".

2   On the sign in page, enter your email address, and then click Next.

3   On the Create Account page, if you're prompted to enter an activation code, enter the code you received from the person who sent you the email.

   Rationale: Some organizations want to notify the email sender when you're creating your account so that they can send you a code to verify your identity. If you didn't get the code, click the Resend link to resend the code to the sender. You may also need to contact them for the code.

4   On the Create Account page, create a password, and then click Next.

5   If you're prompted to enter a CAPTCHA code to verify your identity, type the code shown on the screen, and then click "Create account".

6   Check your email for an account verification link. In the email, click "Activate account".

7   On the sign in page, enter your email address, and then click Next.

8   Enter your password, and then click "Sign in".

9   If required, enter a mobile number to receive a one-time passcode for verifying your identity. Once you receive the code, use it to finish signing in.

   Tip: To select a country code, start typing your country name in the Country field.

You received an email containing a secure message.

To create your account and access the message:

1 In the email, click "Access message".

2 On the sign in page, enter your email address, and then click Next.

3 On the Create Account page, if you're prompted to enter an activation code, enter the code you received from the person who sent you the email.

    Rationale: Some organizations want to notify the email sender when you're creating your account so that they can send you a code to verify your identity. If you didn't get the code, click the Resend link to resend the code to the sender. You may also need to contact them for the code.

4 On the Create Account page, create a password, and then click Next.

5 If you're prompted to enter a CAPTCHA code to verify your identity, type the code shown on the screen, and then click "Create account".

6 Check your email for an account verification link. In the email, click "Activate account".

7 On the sign in page, enter your email address, and then click Next.

8 Enter your password, and then click "Sign in".

9 If required, enter a mobile number to receive a one-time passcode for verifying your identity. Once you receive the code, use it to finish signing in.

    Tip: To select a country code, start typing your country name in the Country field.

You didn't receive an email. You just want to create an account.

To create your account:

1 In a browser or the Kiteworks mobile app, enter the address of the server you want to access.

2 On the sign in page, click "Create account".

    Tip: If you don't see the "Create account" link on the page, the server administrator doesn't allow people to self-register. Contact the server administrator for assistance. You may also see a Contact Us link on the page for contacting the administrator.

3 Enter your email address, create a password, and then follow the prompts.

4 If you're prompted to enter a CAPTCHA code to verify your identity, type the code shown on the screen, and then click "Create account".

5 Check your email for an account verification link. In the email, click "Activate account".

6 On the sign in page, enter your email address, and then click Next.

7 Enter your password, and then click "Sign in".

8 If required, enter a mobile number to receive a one-time passcode for verifying your identity. Once you receive the code, use it to finish signing in.

    Tip: To select a country code, start typing your country name in the Country field.

Sign in to the Kiteworks Web application

Once you've created or activated your user account, sign in to the Kiteworks Web application to access shared folders, download files, view secure messages, and more.

To sign in:

1 In a web browser, enter the address of your Kiteworks server.

2 Type your user name or email address associated with your account, and then click Next.

   Tip: When LDAP or single sign-on policies are in place for your company, you typically enter a user name instead of an email address. If you don't know your user name, contact the server administrator for assistance. You may also see a Contact Us link on the page for contacting the administrator.

   If you receive a "Missing mandatory parameter" message, inform your administrator that the server needs to be updated with the latest version before you can sign in.

3 Type your password, and then click Sign In.

   Alternative: If you forgot your password or need to change it, click the Forgot Password link and then follow the prompts reset your password.

4 If this is your first time signing in and two-factor authentication is required for your account, follow the on-screen instructions to set it up.

   • If text-based authentication (SMS) needs to be set up, you'll be prompted to provide a mobile number for your account. Enter the mobile number and when the passcode is texted to your phone, enter the code into the box on the sign in screen.

   • If time-based, one-time password (TOTP) needs to be set up, use your phone to scan the barcode on the setup screen to an authenticator app, and then enter the code returned by the authenticator app. For more detailed instructions, refer to Set up time-based, one-time passwords

   • For other authentication methods, no set up is required. For example, a passcode may be emailed to your account or other credentials using mechanisms such as RSA token or YubiKey may be required to verify your identity. Just enter the information required to sign in.

When two-factor authentication is required, each time you sign in you'll need to enter a new passcode sent by email, text, or generated by an authenticator app. For faster sign in, your administrator may allow you to skip this step. On the sign in screen, click the "Remember this device" check box to temporarily add your computer or phone as a trusted device.

If you enter an incorrect user name or password, your administrator may require you enter a CAPTCHA code for further verification. Verify your user name and password, and then type the code shown on the screen to finish signing in.

If you enter an incorrect password too many times, your user account may get locked. If this happens, you'll be notified by email. You can wait for a period of time and then try to sign in again or contact your administrator for assistance. The administrator determines how many times you can enter an incorrect password before your account gets locked, and also how long it remains locked before you can sign in again.

To sign out:

In the upper right corner of the screen, click your user name, and then click Sign Out.

Set up time-based, one-time passwords

For two-factor authentication (2FA), your administrator may require you use a time-based, one-time password (TOTP) when signing in to the web application. TOTP is used by authentication apps to generate one-time numeric passwords that remain valid for 30 seconds. It provides extra security when authenticating your account.

Your administrator determines whether you must use TOTP. You'll see the TOTP setup screen the next time you go to sign in to the web application. Use your phone to scan the barcode on the setup screen, enter the code returned by the authenticator app and you're done. Each time you sign in you'll need to enter a new passcode generated by the authenticator app. Your administrator may provide an option for you to remember your device settings so that you can skip this step.

The following authentication apps have been tested, although you can use any app that supports the TOTP standard.

- Microsoft Authenticator
- Google Authenticator
- FreeOTP Authenticator (Red Hat)
- Twilio Authy
- Duo Mobile
- LastPass Authenticator
- OneLogin Protect

To set up time-based, one-time passwords:

1 Go to sign in to the web application.

2 When prompted to set up TOTP, open the authenticator app on your phone and scan the barcode to the app.

- You may be able to use your device camera to scan the code to the app.
- To manually get the code, click "Having trouble scanning the code?". Copy the secret key and enter it into your account in the authenticator app.

3 Enter the code from your authenticator app, and then click Submit.

Result: A secret key is associated with your device and user account.
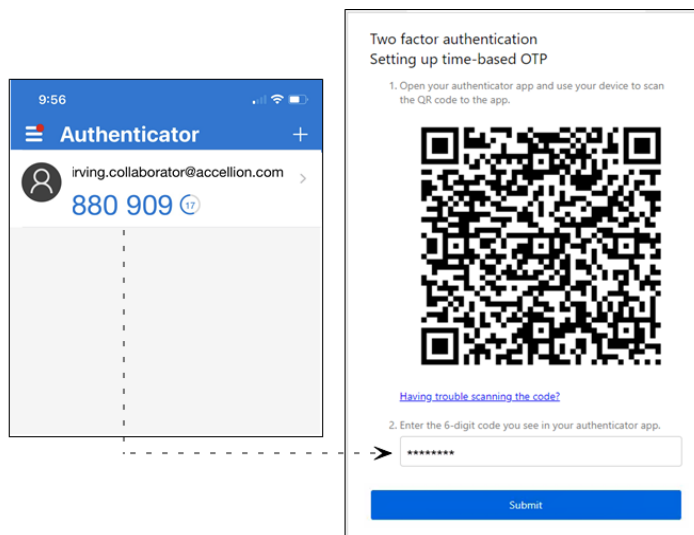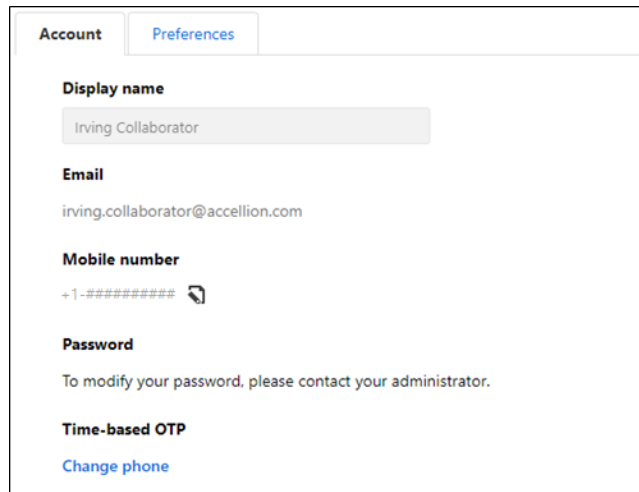
Reset your secret key

If you get a new phone or want to use a different authenticator app, you need to reset the secret key associated with your device and user account.

To reset your secret key:

1 Open the web application.

2 In the upper right corner of the screen, click your profile picture, and then click Settings.

3 On the Account tab, next to Time-based OTP, click Change Phone.

4 Enter the password you use to sign in to the web application, and then click Retrieve New Code.

5 Open the authenticator app on your phone and scan the barcode to the app.

  - You may be able to use your device camera to scan the code to the app.
  - To manually get the code, click "Having trouble scanning the code?". Copy the secret key and enter it into your account in the authenticator app.

6 Enter the code from your authenticator app, and then click Verify.

Result: A new secret key is associated with your device and user account.

Create folders

You store your files in secure folders which you can share with other users for collaboration. You can create folders from scratch or upload folders from your desktop or enterprise content sources.

When creating folders, you may want to accept the default security settings assigned to them. For information about folder security settings, refer to the online help in the Kiteworks Web application or the *Kiteworks Web User Guide*.
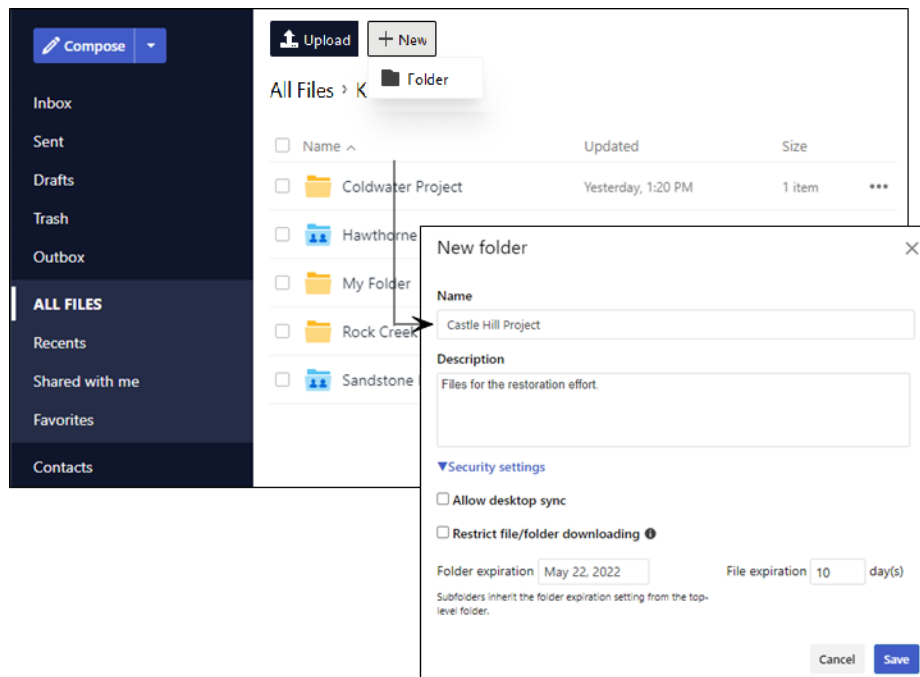
Upload files to folders

You can upload files of any size securely to your Kiteworks folders from your desktop. Once uploaded, you can share the folders so that folder members can access the files.
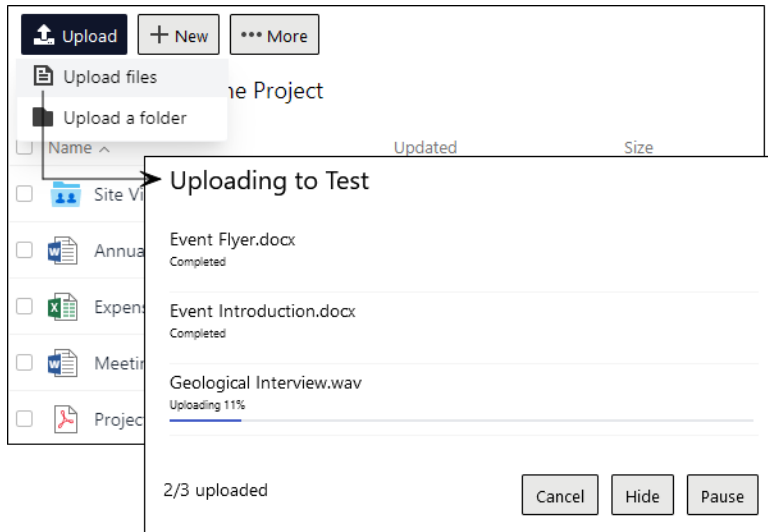
Share folders

Once you've uploaded files to folders, you can share the folders to collaborate with other users.

In the folder you want to share, click More > Invite New Member.

After sending the invitation, you can use the Members pane to change the role of an individual user.
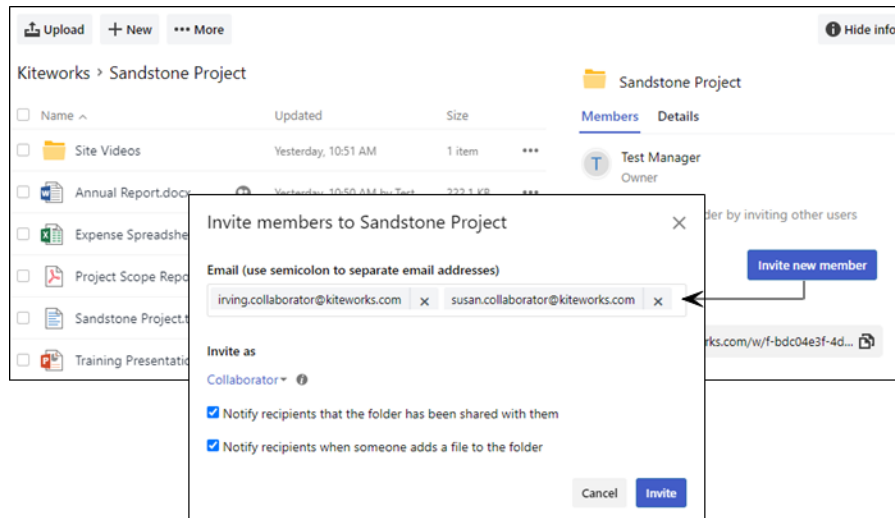
Share files

You can share individual files in a folder without giving users access to other files in the folder. Once shared, users can click the "Shared with me" link in the navigation pane to see files that were shared with them.

When you share a file, you can assign users the Collaborator role with permissions to edit, download, send the file, and more. Or you can assign them the Viewer role with limited permissions to work with the file. The server administrator determines which roles you can assign.

Send files

You can send files securely using Kiteworks. The files get uploaded to your Kiteworks server and a link is sent to recipients for accessing the files. After the link expires, the files are deleted from the server.

If a recipient doesn't have a user account on the server, they'll be prompted to create one.
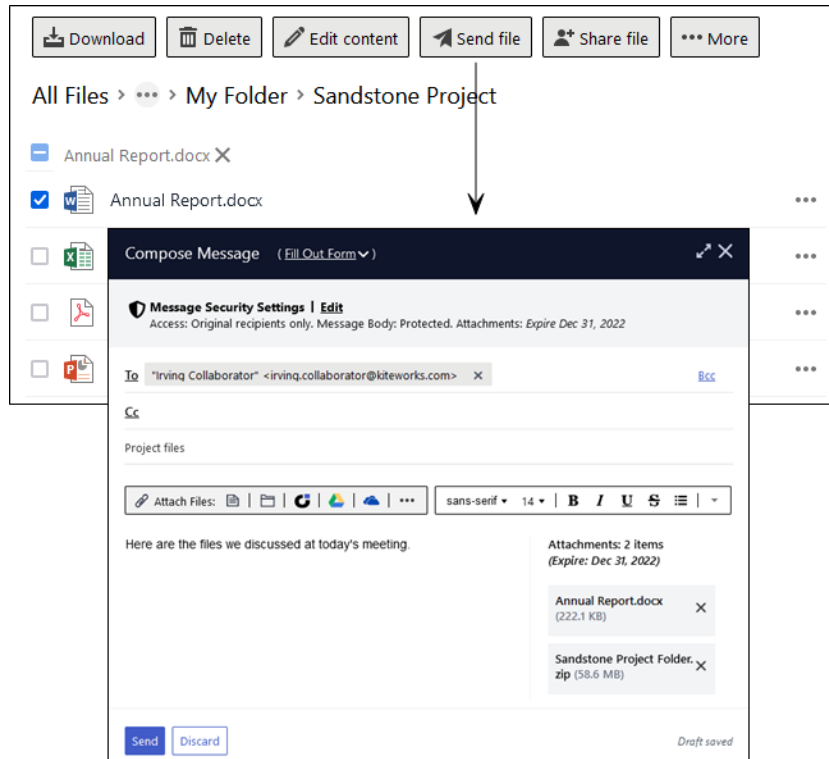
Create and edit Microsoft Office files

If you have an Office 365 subscription, you can create and edit Microsoft Word, Excel, and PowerPoint files while maintaining the files securely within Kiteworks. Depending on your system configuration, you may be able to create and edit the files using your Office desktop or web applications. With Office 365, you can collaborate with co-authors in real time, simultaneously editing and saving content as you work.

For instructions on how to create and edit Office files from within Kiteworks, refer to the online help in the Kiteworks Web application or the *Kiteworks Web User Guide*.
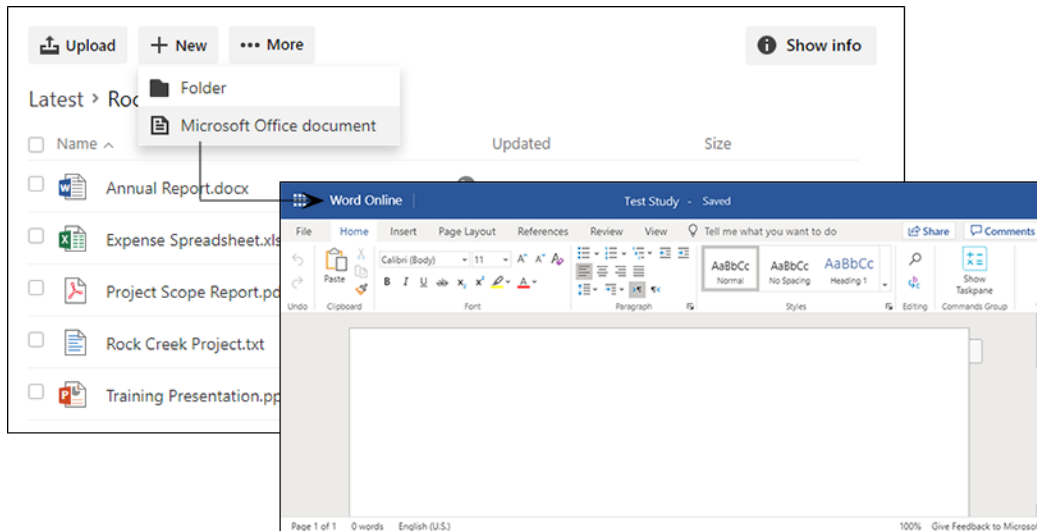
Create and edit tasks

You can create and assign file-related tasks to folder members. For example, you can create a task requesting that a folder member review and edit a file by a specific date.

When you assign tasks to folder members, they receive email notifications describing their assignments, along with secure links for accessing the files. You also receive copies of the notifications.

Add comments to files

There are several ways you can comment on files, but the fastest way is to select the file, and then in the right pane, click Comments. Type your comment, and then click Post.

Here are other ways to add comments:

- Open the file, and then in the right pane in the viewer, click Comments.
- When responding to a file upload request, click the Upload link in the email message, and then upload the files. When the file upload completes, click the Comment link next to the file.

Additional resources

Resources

Access user documentation

To access the user documentation, click the profile icon, and then click Help to display a list of downloadable user guides. If you can't access the guides, contact your administrator.

Get support

Need assistance with your Kiteworks product? Contact us with requests for assistance or to submit product enhancements.

Contact customer support at support@kiteworks.com.

Learn more about Kiteworks products

Visit the Kiteworks Support Portal to read technical articles, view training videos, search the knowledge base, and download additional user documentation.